

---

# Teaching staff tracker

## How do I upload teaching staff emails into the BOS tracker system?

---

### Why do we want to use the email “survey access control” system?

Using this system allows us to see how many people you upload, and what percentage complete the tracker. This is important for the pilot because we need to know how many teaching staff are (a) invited at each institution, and (b) respond to this kind of survey request. It is easier and more accurate for you and for us to automate this.

Using this system allows you to see the details about which individuals complete the tracker, and to automatically upload two other pieces of information too (e.g. curriculum area, campus). This could help with your analysis (e.g. to see the results of each question filtered by campus).

Jisc cannot see this information. Any information you upload will pipe through into the analysis area, ready for you to use e.g. to filter results by curriculum area.

### Do we have to use the survey access control system?

No, but we strongly recommend you do if at all possible and because of the reasons above. However we understand that you may need to use an open URL to access the tracker, if for example you are using the tracker during staff workshops and you don't know who will be turning up. If this is the case then please let us know how many people you ask to take the tracker so we can compare numbers asked with the numbers that complete the tracker.

### How do I set up survey access control?

Simply put, this requires you to upload a CSV file of teaching staff data into BOS. This needs to be laid out in a specific set of columns. You then link a hidden question to each column.

Some of you have already done this for your students; for those who haven't used this before then please be reassured that we are available for support via [tracker.support@jisc.ac.uk](mailto:tracker.support@jisc.ac.uk)

Both staff tracker surveys have suggested hidden questions in there ready to capture FOUR columns of data: username (suggest first and surname), email address, and two other variables of your choice (called x1 and x2).

Once the staff data are uploaded they will be tied to hidden question fields within the tracker. You can draft an email within BOS Online Surveys and use it to generate unique links for each person. Finally, you can email your staff with their unique survey link. You do this either from inside BOS (maximum of 5000 emails can be sent from one tracker survey) OR download the unique links and email them outside of BOS via your mail merge system.

This process is explained step-by-step overleaf, and is also covered using generic examples via the BOS help pages:

<https://www.onlinesurveys.ac.uk/help-support/importing-your-respondent-list/>

<https://www.onlinesurveys.ac.uk/help-support/controlling-who-can-complete-your-survey/>

## Step-by-step instructions for uploading staff details into the tracker

<p>1. Create an excel file of the data in the format shown, leaving the password and token columns blank (BOS uses these)</p>	<table border="1"> <thead> <tr> <th></th> <th>A</th> <th>B</th> <th>C</th> <th>D</th> <th>E</th> <th>F</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>username</td> <td>password</td> <td>email</td> <td>token</td> <td>x1</td> <td>x2</td> </tr> <tr> <td>2</td> <td>Tabetha Newman</td> <td></td> <td>t@gmail.com</td> <td></td> <td>Science</td> <td>Full time</td> </tr> <tr> <td>3</td> <td>Zoe Bell</td> <td></td> <td>z@gail.com</td> <td></td> <td>Art History</td> <td>Part time</td> </tr> <tr> <td>4</td> <td>Peter Smith</td> <td></td> <td>tasdaf@gmail.com</td> <td></td> <td>Engineering (mechanical)</td> <td>Part time</td> </tr> <tr> <td>5</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>6</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>		A	B	C	D	E	F	1	username	password	email	token	x1	x2	2	Tabetha Newman		t@gmail.com		Science	Full time	3	Zoe Bell		z@gail.com		Art History	Part time	4	Peter Smith		tasdaf@gmail.com		Engineering (mechanical)	Part time	5							6						
	A	B	C	D	E	F																																												
1	username	password	email	token	x1	x2																																												
2	Tabetha Newman		t@gmail.com		Science	Full time																																												
3	Zoe Bell		z@gail.com		Art History	Part time																																												
4	Peter Smith		tasdaf@gmail.com		Engineering (mechanical)	Part time																																												
5																																																		
6																																																		
<p>2. Save a copy as a CSV file</p>	<p>Save As: Teaching staff tracker upload file</p> <p>Tags:</p> <p>Sign ups and confirmed</p> <p>Search</p> <table border="1"> <thead> <tr> <th></th> <th>Date Modified</th> <th>Size</th> <th>Kind</th> </tr> </thead> <tbody> <tr> <td>Teaching staff t...irmed 2018.xlsx</td> <td>15 Mar 2018, 09:55</td> <td>21 KB</td> <td>Micros...(.xlsx)</td> </tr> </tbody> </table> <p>File Format: Comma Separated Values (.csv)</p> <p>Options...</p> <p>Cancel Save</p>		Date Modified	Size	Kind	Teaching staff t...irmed 2018.xlsx	15 Mar 2018, 09:55	21 KB	Micros...(.xlsx)																																									
	Date Modified	Size	Kind																																															
Teaching staff t...irmed 2018.xlsx	15 Mar 2018, 09:55	21 KB	Micros...(.xlsx)																																															

<p>3. Remove the first row of headers, so the saved CSV now only has data, and save again.</p>	<table border="1"> <thead> <tr> <th></th> <th>A</th> <th>B</th> <th>C</th> <th>D</th> <th>E</th> <th>F</th> <th>G</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Tabetha Newman</td> <td></td> <td><a href="mailto:t@gmail.com">t@gmail.com</a></td> <td></td> <td>Science</td> <td>Full time</td> <td></td> </tr> <tr> <td>2</td> <td>Zoe Bell</td> <td></td> <td><a href="mailto:z@gail.com">z@gail.com</a></td> <td></td> <td>Art History</td> <td>Part time</td> <td></td> </tr> <tr> <td>3</td> <td>Peter Smith</td> <td></td> <td><a href="mailto:tasdaf@gmail.com">tasdaf@gmail.com</a></td> <td></td> <td>Engineering (mechanical)</td> <td>Part time</td> <td></td> </tr> <tr> <td>4</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>5</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table> <p><i>Top tip: Add your details in one row so you can test the system.</i></p>		A	B	C	D	E	F	G	1	Tabetha Newman		<a href="mailto:t@gmail.com">t@gmail.com</a>		Science	Full time		2	Zoe Bell		<a href="mailto:z@gail.com">z@gail.com</a>		Art History	Part time		3	Peter Smith		<a href="mailto:tasdaf@gmail.com">tasdaf@gmail.com</a>		Engineering (mechanical)	Part time		4								5							
	A	B	C	D	E	F	G																																										
1	Tabetha Newman		<a href="mailto:t@gmail.com">t@gmail.com</a>		Science	Full time																																											
2	Zoe Bell		<a href="mailto:z@gail.com">z@gail.com</a>		Art History	Part time																																											
3	Peter Smith		<a href="mailto:tasdaf@gmail.com">tasdaf@gmail.com</a>		Engineering (mechanical)	Part time																																											
4																																																	
5																																																	
<p>4. Go to your version of the teaching staff tracker in Online Surveys. Go to Distribute / Create a list of respondents</p>																																																	
<p>5. Choose to "create a list of respondents". Then click on "import respondents".</p>																																																	

6. Click on “choose file” and choose your CSV file. Click save.

**Distribute** Analyse

Upload Respondents

Select a csv file to upload or paste your credentials into the text box below:  
 File (maximum size 10MB):  no file selected

7. You should now see that the details have been uploaded

**Credentials saved**  
3 added

Survey access control

Filter by username to email

<input type="checkbox"/>	Username	Password	Email	Token	x1	x2	x3
<input type="checkbox"/>	Peter Smith	ff32d2d872	tasdaf@gmail.co...	7ba5d2453cf64...	Engineering (me...	Part time	
<input type="checkbox"/>	Zoe Bell	c0dc03d384	z@gail.com	56c6af18caff4d...	Art History	Part time	
<input type="checkbox"/>	Tabetha Newman	ea3b2af2d4	t@gmail.com	8d24f41b0b204...	Science	Full time	

Username  Token

8. Now go to Distribute / distribution settings / survey emails.

Edit the suggested text for the body of the email message

Design **Distribute** Analyse

- Survey launchpad
- Survey access control
- Pre-population parameters
- Distribution settings**
- Piping overview

Preview survey

### Distribution settings

Opening date \* 13/03/2018 10:54

Closing date \* 31/05/2018 23:54

Public survey name \* Mini Teaching Staff Digital Experience Tracker

Survey short name \* https://stafftracker.onlinesurveys.ac.uk/sample-mini-teachingstafftracker

- Survey responses
- Survey redirects
- Survey messages
- Survey emails**

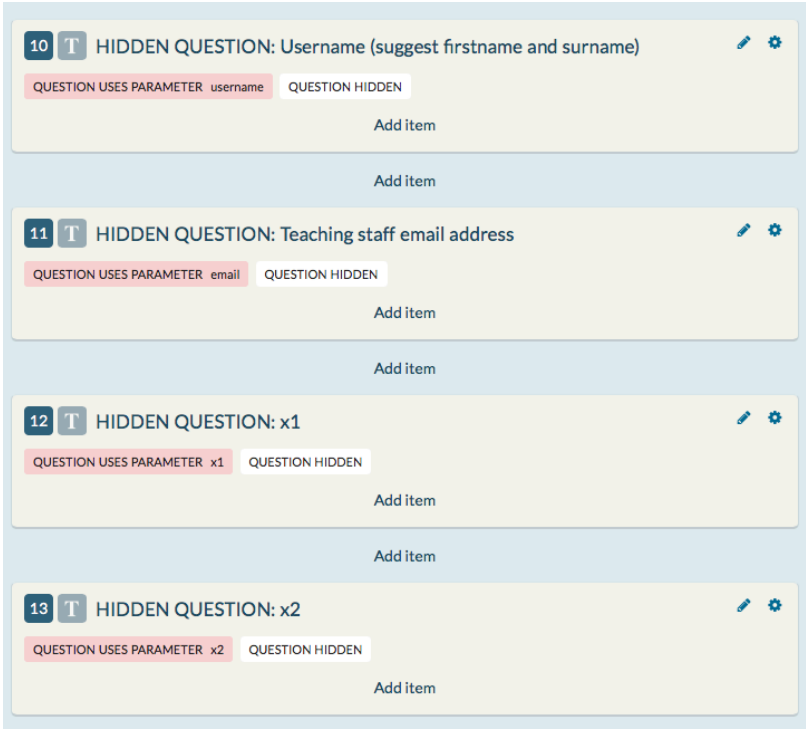
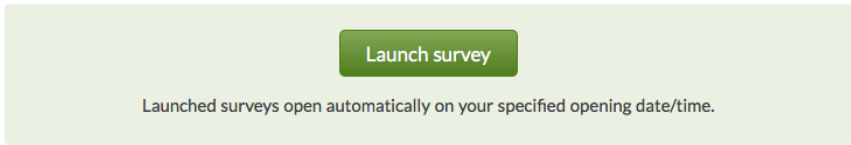

Invitation message subject \* Please tell us about your use of digital in your teaching

Invitation message body \* Dear [EMAIL]  
We are interested about your experiences of teaching using digital technologies, and about the institutional support you get in terms of access and CPD.

Reminder message subject \* Survey completion reminder

Reminder message body \* Dear [EMAIL]  
We have not yet detected your response to our survey.  
[CUSTOM\_URL]  
- BOS Team

Save Cancel

<p>9. In the Design area look at the hidden questions. These are tied to the columns you uploaded.</p> <p>If you don't want to use all the questions then you need to remove those columns in the CSV file.</p>	
<p>10. Launch your tracker in the Distribute area</p>	
<p>11. From the Distribute Launchpad click "Send invitation emails"</p>	<p><b>Invitations and reminders</b></p> <hr/> <p>Send email invites to potential respondents (as listed in 'Survey access control').</p> 

THE END